

CONSUMER
ATTITUDES
TOWARD

Supermarket.
Pharmacies



CONSUMER ATTITUDES TOWARD SUPERMARKET PHARMACIES

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and

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The Food Marketing Institute (FMI) is a nonprofit association conducting programs in research, education, and public affairs on behalf of its 1,500 members -- food retailers and wholesalers and their customers in the United States and around the world. FMI's domestic member companies operate approximately 19,000 retail food stores with a combined annual sales volume of \$180 billion--more than half of all grocery sales in the United States. FMI's retail membership is composed of large multistore chains, small regional firms, and independent supermarkets. Its international membership includes 230 members from 60 countries.

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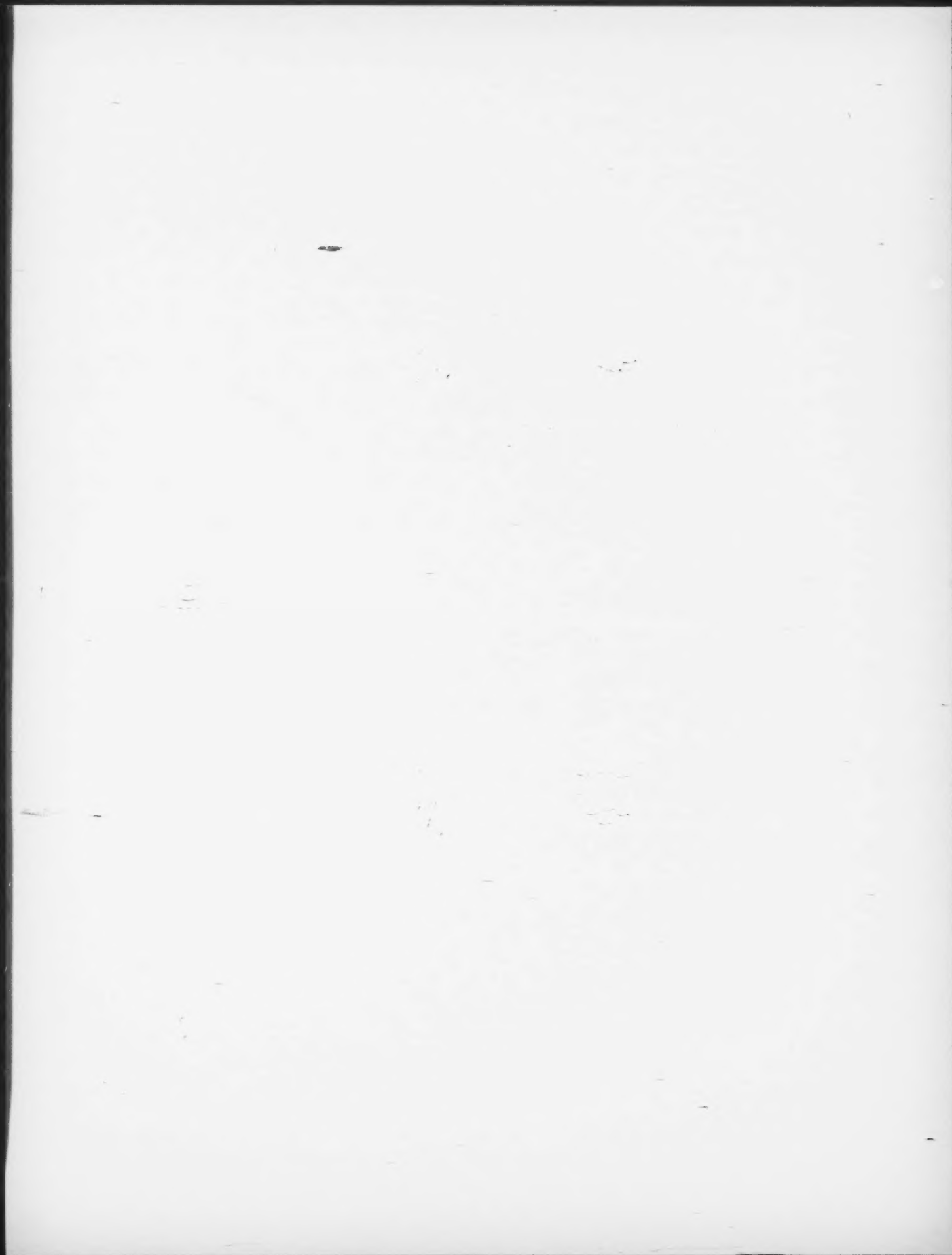


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INTRODUCTION

Since 1985 when the Food Marketing Institute first examined supermarket pharmacies, food-drug combination stores have become the fastest growing retail segment for prescription drug products. Both the supermarket and the consumer benefit. Supermarkets reported increased sales, not just of over-the-counter (OTC) and health and beauty care products but also overall sales. Consumers favor the one-stop approach.

In 1990 FMI began an extensive study of prescription buyer attitudes toward retail outlets, sponsored by the consumer and pharmaceutical companies of Johnson & Johnson. The objective was to provide information on marketing and merchandising to those responsible for the pharmacy in supermarkets.

The study involved three phases:

Focus groups in three major markets.

National telephone survey of over 600 pharmacy consumers.

Survey of pharmacy directors in 65 food-combination retail companies.

Overall Findings

The research clearly indicates that senior supermarket management needs to focus on the central role the pharmacy plays in the overall store rather than as "another department." The pharmacy is integral to the overall business strategy of the supermarket of the '90s. Many retailers feel that it is time to break down, forever, the conceptual wall that separates "pharmacy" and the "rest of the store." Any measurement of the pharmacy by management must analyze its impact on the overall store, not the pharmacy alone.

Survey results indicate the customer who shops at a supermarket with a pharmacy and uses that pharmacy:

- rates that store higher on every measure of quality and service.
- is much more likely to buy Health & Beauty Care (HBC) and non-prescription medicine.

The pharmacist is critical as a service ambassador for the entire store.

Proximity of HBC items to the pharmacy is important to the consumer and provides a strong synergy with the pharmacy concept.

Key elements for establishing pharmacy patronage are convenience, a strong price image, and a favorable perception by consumers of a congenial relationship with the pharmacist.

Conversion of non-users into pharmacy users is an overall supermarket priority, not just a priority for the pharmacy itself.

This research provides detailed suggestions for strengthening the pharmacy and thus increasing overall store business.

Implications

Over many years the food industry has built a high level of public trust. This trust is built on overall quality, service, and added value. The dramatic findings of improved customer loyalty across all departments among pharmacy users in food-drug combination stores, as revealed in this study, may be, in part, a result of this preexisting credibility.

Based on a long history of respected service to the community, the pharmaceutical profession is a worthy partner and valuable asset to the food trade. The public demonstrates no significant inhibitions about their presence in this "non-traditional" setting. To the food-drug combination pharmacy user, this is not just a matter of convenience, it is added value.

The potential competitive impact of the pharmacy in supermarkets has not been fully realized; many shoppers are not fully aware of the pharmacy. The major competitors are devoted to a pricing strategy and have taken aggressive aim at the valuable OTC and health and personal care categories. They have succeeded in creating a higher price image of the supermarket pharmacy and OTC products among many food-combination customers. Effectively linking the supermarket pharmacy and the pharmacist in a value-added sense may offset this competitive thrust.

MANAGEMENT SUMMARY

The presence of a pharmacy in the supermarket has a clear and positive impact on a customer's likelihood to purchase personal care products and over-the-counter (OTC) medications. Reliance on the supermarket for these types of products is significantly higher in food-drug combination stores than in other stores.

Food-drug combination store customers rate their store higher overall than shoppers in non-pharmacy supermarkets. Particularly strong image ratings exist among food-drug combination shoppers for the wide range of services and departments available and for the store being progressive and "up-to-date."

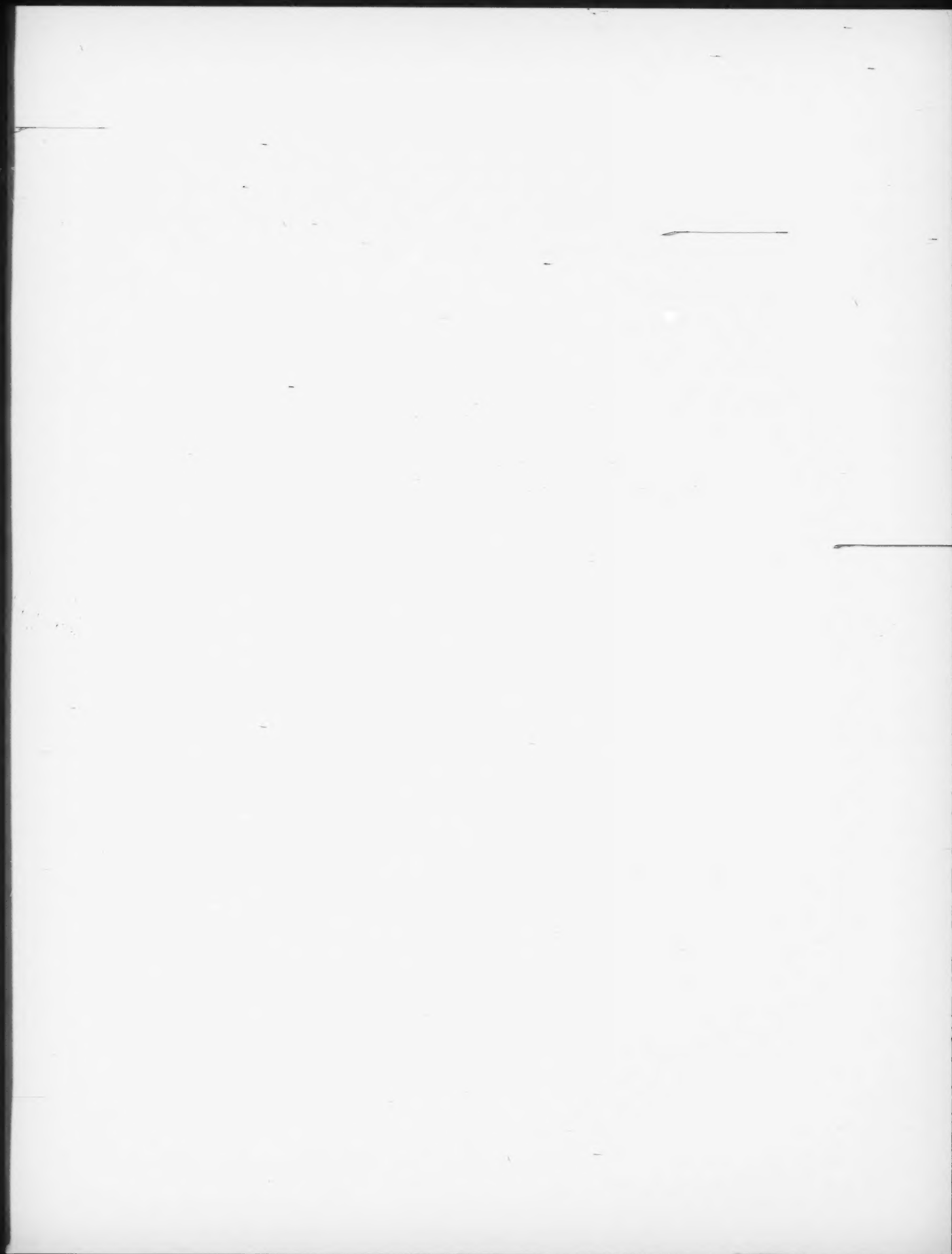
Only about half of food-drug combination shoppers currently patronize the store pharmacy. Supermarket pharmacies account for an estimated one-third of the total prescriptions filled by those customers. This suggests that the full potential of food-drug combination pharmacies has not been reached. By comparison, the average supermarket captures about three-fourths of a customer's fresh produce purchases. —

Many food-drug combination shoppers do not currently recognize the value-added benefit of the store pharmacy, non-users of the pharmacy do not recognize the convenience factor that current users find.

Promotional efforts directed at increasing the customer's recognition of the pharmacy's convenience, as well as promoting personalized services and competitive pricing, would reach a broad base of currently uninformed shoppers.

The presence of a pharmacy does not appear to increase sales in other food departments of the supermarket. Shoppers in food-drug combination stores have virtually the same food shopping habits as shoppers in other supermarkets.

Pharmacy directors view service and convenience as the most important factors in attracting and retaining pharmacy customers. They feel that accessibility of pharmacists and having patient medication record systems build and maintain loyal customers. A majority feel that pharmacists do have enough time to interact with customers. Many also acknowledge that good pricing on maintenance medications is important in promoting store pharmacies. They assess (based on the consumer data) the importance of the pharmacy in increasing HBC sales and _____ customer perceptions of the store providing good service.



Chapter I

PURCHASES OF PERSONAL CARE PRODUCTS AND OTC MEDICATIONS IN SUPERMARKETS

The presence of a pharmacy in the supermarket appears to have a significant positive impact on a shopper's likelihood to buy personal care products and nonprescription medicines in the food store.

- Among food-drug combination shoppers, 52 percent claim they usually purchase their personal care products in their primary supermarket. By comparison, only 37 percent of those who shop in supermarkets without a pharmacy report buying their personal care products in that store.
- Similarly, food-drug combination shoppers are more likely than those who shop in supermarkets without a pharmacy to buy their nonprescription medicine in a supermarket (56 percent vs. 39 percent respectively).

	Food-Drug Combination Shoppers	Non-Pharmacy Supermarket Shoppers
	%	%
Personal Care Products		
Supermarket	52	37
Non-food store	44	62
Nonprescription Medicines		
Supermarket	56	39
Non-food store	39	57

Personal care products and nonprescription medicines not purchased in a supermarket tend to be purchased in chain drug stores, and, to a lesser extent, in mass merchandisers. A small proportion of shoppers buy these items in independent pharmacies or other types of outlets.

	Food-Drug Combination Shoppers	Non-Pharmacy Supermarket Shoppers
	%	%
Personal Care Products		
Non-food stores	44	62
Chain drug	25	37
Mass merchandiser	13	16
Other outlets	7	9
Nonprescription Medicines		
Non-food stores	39	57
Chain drug	23	35
Mass merchandiser	11	15
Other outlets	5	6

(See Tables 1 and 2 for full details)

Shoppers were asked whether certain selected personal care products and nonprescription medicines were usually purchased in a supermarket or in a non-food store. Wide differences are found in the shopping habits of food-drug combination shoppers and non-pharmacy supermarket shoppers when it comes to these types of products.

- For example, 62 percent of food-drug combination shoppers report buying OTC pain relief products at a supermarket. While among shoppers of non-pharmacy supermarkets, only 4-in-10 (42 percent) buy pain relief products in their supermarket. As the following table shows, for each of the selected items, the food-drug combination shopper is more likely to rely on the supermarket for these purchases. Differences between the two shopper groups are widest for pain reliever and cough and cold products, while the least amount of difference is found for sanitary protection and oral care products.

	Food-Drug Combination Shoppers	Non-Pharmacy Supermarket Shoppers
	%	%
Usually Buy Products In Supermarket Rather Than Non-Food Store		
Hair care products	50	35
Pain reliever products	62	42
Oral care products	59	48
Sanitary protection products	58	49
Cough and cold products	47	40
Skin care products	47	34
Wound care products	56	40

(See Table 3 for full details)

Shoppers who buy personal care products and nonprescription medicines at supermarkets do so mainly for convenience; specifically, they recognize the advantages of one-stop shopping. Food-drug combination shoppers are even more likely to recognize this convenience benefit than are non-pharmacy supermarket shoppers. On the other hand, price (including sales and coupons) appears to be the driving force behind purchases of health and beauty care (HBC)/OTC products at non-food stores. Shoppers at food-drug combination stores, however, are less likely to recognize a price advantage in non-food stores.

(See Tables 6 and 7 for full details.)

All shoppers were asked to rate certain characteristics of the health and beauty care/over-the-counter medicine section of their supermarket compared to these same sections in non-food stores.

In general, food-drug combination shoppers give higher ratings to the HBC/OTC section of the supermarket than do shoppers in supermarkets without pharmacies. Food-drug combination store shoppers are more likely than non-pharmacy supermarket shoppers to recognize the convenience benefits. These ratings also point to service and wide product selection as benefits of the HBC/OTC section that are apparent to food-drug combination shoppers. The biggest individual difference in attitudes between food-drug combination customers and their counterparts in non-pharmacy supermarkets is a recognition that in food-drug combination stores there is someone available to answer questions about products.

**Percent Rating HBC/OTC Section Better in
Supermarkets Than In Non-Food Stores**

	Food-Drug Combination Shoppers	Non-Pharmacy Supermarket Shoppers
	%	%
Being convenient to shop	56	45
Having someone available to answer questions about products	26	11
Being fairly priced	27	26
Frequently having advertised special sales	35	27
Having a wide variety and selection of products and brands	34	20
Being well-stocked	30	22
Having a selection of products for infant care	15	20

(See Table 8 for full details.)

Chapter II

OPINIONS ABOUT PRIMARY SUPERMARKET

Overall satisfaction with shoppers' primary supermarket was measured by a rating of the store on a 0-to-10 rating scale (10 = highest rating; 0 = lowest rating). Food-drug combination shoppers express slightly more favorable attitudes towards their primary food store compared to shoppers of supermarkets without a pharmacy.

- Nearly 8-in-10 (78 percent) food-drug combination shoppers indicated a high level of satisfaction (Ratings of 8, 9, or 10) with their primary food store. Comparable ratings were given by 7-in-10 (70 percent) non-pharmacy supermarket shoppers.
- Not surprisingly, few shoppers of either group expressed dissatisfaction with their primary food store.

	Food-Drug Combination Shoppers	Non-Pharmacy Supermarket Shoppers
	%	%
Overall Ratings:		
Highly favorable (8-10)	78	70
Moderately favorable (6-7)	17	22
Indifferent (5)	4	5
Not favorable (0-4)	1	2

(See Table 9 for full details.)

Shoppers were also asked to rate their primary food store on seven specific characteristics. In general, food-drug combination shoppers rated their stores more favorably than shoppers of supermarkets with no pharmacy.

The biggest differences found between the two shopping groups is in their ratings regarding services and progressiveness. More than 8-in-10 (82%) food-drug combination shoppers gave their primary food store a highly favorable rating for "offering a wide range of services and departments," while only 5-in-10 (53%) shoppers of non-pharmacy supermarkets gave their store a favorable rating. For "being progressive and up-to-date," 8-in-10 (80%) food-drug combination shoppers rated their primary store highly favorable compared to only about a third (65%) of non-pharmacy supermarket shoppers.

	Food-Drug Combination Shoppers	Non-Pharmacy Supermarket Shoppers
	%	%
Highly favorable ratings (8-10):		
Offering a wide range of services and departments	82	53
Being progressive and up to date	80	65

Food-drug combination shoppers were also a little more likely than non-pharmacy supermarket shoppers to give highly favorable ratings to their store for:

	Food-Drug Combination Shoppers	Non-Pharmacy Supermarket Shoppers
	%	%
Offering professional service	76	65
Providing good quality service	81	76
Being friendly and personal	80	74
Meeting expectations and cleanliness	83	78
Offering good values	71	76

Offering "good values" was the only characteristic where shoppers of non-pharmacy supermarkets rated their primary stores a little bit higher than did shoppers of food-drug combination stores. (See Tables 10 to 17 for full details.)

Chapter III

USE OF FOOD-DRUG COMBINATION PHARMACIES

In screening for participants for this survey, we found that about 50 percent of food-drug combination shoppers indicate that they at least sometimes use the store pharmacy.

- About 1-in-5 food-drug combination shoppers (21 percent) have almost all of their prescriptions filled in the store pharmacy.
- On the average, supermarket pharmacies account for an estimated 31 percent of the total prescriptions their customers have filled in a year. *(See Table 18 for full details.)*
- Persons who have prescriptions filled at food-drug combination pharmacies report heavier annual prescription activity (an average of 13) than do shoppers in supermarkets with no pharmacy (10 per year). They are also somewhat less likely to have insurance plans that require Rx's to be filled at certain pharmacies. *(See Table 19A for full details)*
- Persons who use the supermarket pharmacies have higher family incomes and are more likely to be employed. On other characteristics, there are little differences between the respective groups. *(See Table 19B for full details.)*

Chapter IV

OPINIONS ABOUT FOOD-DRUG COMBINATION PHARMACIES

About 4-in-10 (39 percent) food-drug combination shoppers feel a pharmacy in their primary food store makes the store a better place to shop, with one-fourth (26 percent) reporting the pharmacy makes the store a much better place to shop.

- Among food-drug combination shoppers who actually use their stores' pharmacy, about two-thirds (64 percent) feel the pharmacy makes the store a better place to shop, with nearly half of them (46 percent) saying it makes the store a much better place to shop (*See Table 20 for full details*).
- Additionally, among those who use the pharmacy, about 8-in-10 (83 percent) feel their store pharmacy is the same (54 percent) or better (29 percent) than other pharmacies that they have used, while only 1-in-10 (10 percent) feel it is not as good.
- Food-drug combination shoppers who do not use the store pharmacy hold different views: 44 percent rate the other pharmacy the same and 5 percent better while 26 percent rate it not as good as other pharmacies they have used. Importantly, 3-in-10 (30 percent) shoppers who do not use the pharmacy could not offer an opinion about it, indicating that they have little familiarity with it although it is in the store where most of their major food shopping is done.

Food-Drug Combination Shoppers

	Total %	Use Pharmacy %	Do Not Use Pharmacy %
Better	17	29	5
Same	47	54	39
Not as good	18	10	26
No Opinion	18	7	30

(*See Table 21 for full details.*)

Almost three out of four shoppers who use supermarket pharmacies cite convenience as their reason for using the food-drug combination pharmacy. These consumers like the idea of one-stop shopping and feel that the convenient location and time factors are important advantages. Many indicate that they have prescriptions filled as they are doing their other shopping. A smaller proportion of pharmacy users (18 percent) feel the supermarket pharmacy is less expensive than other pharmacies. Still others (9 percent) find the store's staff friendly and knowledgeable, while 6 percent mention the convenient hours the store is open.

Disadvantages to using supermarket pharmacies cited by shoppers who use them were higher pricing (18 percent), slow service (9 percent), lack of personal service (6 percent) and less of a selection of products (5 percent). A majority (58 percent), however, could think of no disadvantages.

Food-drug combination shoppers who do not use store pharmacies do not recognize the convenience aspects seen by other shoppers. They also have a more widespread impression (24 percent) that food-drug combination pharmacies are more expensive than other pharmacies. Overall, however, they can be characterized by their lack of knowledge and familiarity with supermarket pharmacies: 48 percent could recognize no advantages, while 46 percent could think of no specific disadvantages. (*See Tables 22 and 23 for full details.*)

Using selected characteristics, shoppers were asked to compare their food-drug combination pharmacy with other pharmacies where they have had prescriptions filled. The food-drug combination pharmacy users more often consider their store pharmacy as being "better" rather than "not as good" on each of the dimensions measured. The following is the order in which the strongest comparative ratings were found.

Extremely Strong Ratings:

- Being conveniently located
- Being open during convenient hours

Very Strong Ratings:

- Filling prescriptions in an acceptable length of time/in the time promised
- Having friendly, helpful pharmacists
- Meeting cleanliness expectations
- Having a pharmacist who is willing and available to answer questions about nonprescription products

Fairly Strong Ratings:

- Having a good reputation
- Having an adequate pharmacy staff
- Being able to have a personal relationship with the pharmacist
- Being fairly priced
- Being well stocked

Among non-users of the supermarket pharmacy, the most negative ratings are found for "being fairly priced" (39 percent not as good; 11 percent better) and for "being well stocked" (23 percent not as good; 9 percent better). As indicated earlier, many of these shoppers could not form an opinion. (*See Table 24 for full details.*)

Chapter V

REACTION TO THE CONCEPT OF SUPERMARKET PHARMACIES AMONG SHOPPERS IN SUPERMARKETS THAT DO NOT CURRENTLY HAVE THEM

Shoppers of supermarkets with no pharmacy generally do not recognize the advantages of having a pharmacy in their store. Only 2-in-10 (19 percent) feel a pharmacy would make their supermarket a better place to shop, while the large majority (81 percent) feel adding a pharmacy would make no difference. (*See Table 25.*)

- Shoppers of non-pharmacy supermarkets were further asked about their interest in the idea of adding a pharmacy to their food store. In general, only about one-third (35 percent) expressed any interest, with only 15 percent indicating strong interest. (*See Table 26-A*)
- Those who did express interest saw convenience as the major benefit of an added pharmacy (28 percent), particularly being able to have a prescription filled while shopping (24 percent). Primary reasons given for disinterest included feeling that the supermarket pharmacy would not be convenient (16 percent); a perception of higher pricing (14 percent) and a perception that HMO/third party plans (13 percent) would not be accepted. (*See Table 26-B.*)

Chapter VI

REACTION TO PHARMACY LOCATION IN FOOD-DRUG COMBINATION STORE

About two-thirds (64 percent) of food-drug combination store shoppers report the pharmacy is located in the front of the store, with virtually all (96 percent) of these shoppers rating a front location as convenient. About 7-in-10 (69 percent) of these food-drug combination shoppers feel the pharmacy located in the front of the store is very convenient.

Convenience ratings drop off somewhat among those reporting the pharmacy located in the back of the store. Only one-third (34 percent) feel a location in the back of the store is very convenient.

	Pharmacy Located In	
	Front (259) %	Back (119) %
Very convenient	69	34
Somewhat convenient	27	50
Not convenient	1	11

Despite the difference in convenience ratings, there is no evidence in this survey that location significantly affects patronage of the pharmacy. In fact, 35 percent of users of supermarket pharmacies in this survey reported that their pharmacy was in the "back of the store." Among non-users of supermarket pharmacies; only 23 percent reported a "back of the store" location. (See Tables 28 and 29 for full details.)

Most food-drug combination shoppers report nonprescription medicines and personal care products being located next to the pharmacy and most feel these are the only appropriate types of products to be located there.

About 4-in-10 (41 percent) food-drug combination shoppers say greeting cards are located next to the pharmacy, with nearly the same proportion (39 percent) feeling they should be located there.

Video rentals and food products are reported located next to the pharmacy by about one-third of food-drug combination shoppers, but few shoppers feel this is an appropriate location.

	Products Located Next to Pharmacy	Whether Products Should Be Located Next to Pharmacy
	%	%
Nonprescription	91	85
Personal care products	82	80
Greeting cards	41	39
Any food products	35	11
Video rental section	34	23

(See Tables 30 and 31 for full details.)

About half (48 percent) of food-drug combination shoppers report that their store has blood pressure/pulse rate machines, with pharmacy users more aware of these machines than non-pharmacy users (59 percent vs 36 percent). Few shoppers (8 percent) of supermarkets with no pharmacy report the presence of these machines.

Food-drug combination shoppers exhibit a somewhat higher level of interest in these machines: 35 percent rate the idea of blood pressure/pulse rate machines as excellent or very good, compared to 25 percent of non-pharmacy supermarket shoppers.

Awareness of sponsorship of health screening events in their primary supermarket is also more evident among food-drug combination shoppers than shoppers of non-pharmacy supermarkets (23 percent vs. 13 percent).

About 4-in-10 (39 percent) food-drug combination shoppers feel health screening events are an excellent or very good idea, while 3-in-10 (30 percent) non-pharmacy supermarket shoppers express interest in this area.

(See Tables 32 to 35 for full details.)

Chapter VII

FOOD SHOPPING HABITS

In general, food-drug combination shoppers tend to report virtually the same food shopping habits as shoppers in supermarkets that do not have a pharmacy.

- While a majority of consumers report that they do their major food shopping in two or more supermarkets, over one-third of shoppers in both study groups usually do all their food shopping in only one store.
- Shoppers in both groups report that on average, over 80 percent of their major food shopping is usually done at their primary food store.
- On average, the primary food store for both groups is located about two miles from their homes.

	Food-Drug Combination Shoppers	Non-Pharmacy Supermarket Shoppers
	%	%
Shop in only 1 store	37	37
Shop in 2 stores	40	41
Shop in 3 stores or more	25	22
Average amount of food shopping done at primary store	82.8	82.4
Average number of miles from home to primary store	2.1	2.4

(See Tables 36 to 38 for full details)

Shoppers were asked how much of their fresh produce, fresh meats, frozen foods, dairy products, and paper good items were bought at their primary food store. Food-drug combination stores shoppers and non-pharmacy supermarket shoppers do not differ in terms of the proportion of their purchases of these selected food/specialty items that are made in their supermarket. Both shopper groups buy most, but not all, of these items at the supermarket in which they shop most often.

	Food-Drug Combination Shoppers	Non-Pharmacy Supermarket Shoppers
	%	%
"Average" proportion of shopping done at primary food store:		
Fresh produce	76	76
Fresh meats	70	69
Frozen foods	78	79
Dairy products	80	82
Paper goods	71	71

(See Tables 39 to 43 for full details.)

Very little difference exists in the demographic characteristics of food-drug combination shoppers and the matching group of shoppers in supermarkets without a pharmacy. *(See Table 44 for full details.)*

Chapter VIII

OPINIONS OF SUPERMARKET PHARMACY DIRECTORS

According to supermarket pharmacy directors, service is the key factor in attracting and retaining pharmacy customers.

- Service was rated extremely important by 7-in-10 (71 percent) pharmacy directors. Next in importance were convenience and personal customer/pharmacist relationships, both rated extremely important factors by more than 6-in-10 directors, followed by professional image, rated extremely important by one-half (51 percent) of the directors.
- Hours of operation, price, and having a full line of HBC offerings were rated extremely important by just 2-in-10 (21 percent) supermarket pharmacy directors. (*See Table 45 for full details.*)

In order to build and maintain a loyal customer base, most food store pharmacy directors feel "accessibility of the pharmacist to customers for questions and consultations" and "having patient medication record systems" are extremely important services. Each of these services were rated extremely important by about 8-in-10 professionals (80 percent and 77 percent respectively).

- Other important factors in building/maintaining customers include time for the pharmacist to interact and form relationships and having "Pharmacy" displayed prominently on the outside store sign.
- Of somewhat lesser importance (but still considered to be extremely important by at least 4-in-10 professionals) are having OTC products located adjacent to the prescription area and having advertising specific to the pharmacy.
- Among the least important factors (cited as extremely important by less than 1-in-10 professionals) include emergency prescription service, home delivery services, patient consultation areas, and pharmacy out-reach programs. (*See Table 46 for full details.*)

As stated earlier, accessibility of the supermarket pharmacist to customers and time for the pharmacist to interact and form customer relationships are two of the more important factors associated with building and maintaining a loyal customer base. When pharmacy directors were asked if their pharmacists have enough time to consult with patients, 7-in-10 (69 percent) answered in the affirmative.

- Patient consultation areas were viewed as extremely important by just a few (6 percent) pharmacy directors, yet nearly one-fourth (23 percent) report having these separate areas. *(See Tables 46 and 47 for full details.)*

Pharmacy directors feel the single most effective way to promote pharmacies is to have good prices on maintenance medications. *(See Table 48 for full details.)*

In order for supermarket pharmacy operations to be successful, top management must be committed to the pharmacy. All of the other internal factors asked about were also viewed as being extremely important factors by a majority of professionals. These included: effective recruitment and retention of pharmacy directors; commitment of middle management and store level management to the pharmacy; and a belief from top management that the pharmacist's impact goes beyond profit and loss. *(See Table 49 for full details.)*

With regard to overall store operations, over half the professionals interviewed regard the pharmacy's role in increasing HBC sales in conjunction with prescription sales (52 percent) and increasing customer perception that the supermarket provides good service (51 percent) as extremely important.

- Retaining existing customers and maintaining the overall store image were viewed as being of lower importance, as was drawing new customers into the store. *(See Table 50 for details.)*

Pharmacy clerks are generally supervised by the pharmacy manager, usually alone (65 percent) but sometimes along with the store manager (23 percent).

- Almost all directors report that their company employs pharmacy support personnel (91 percent).
- Levels of staffing and labor costs are justified primarily by a combination of daily prescription averages and pharmacy dollar sales (73 percent). To justify adding additional pharmacists, a combination of daily prescription averages and dollar sales are also used (65 percent). About one fourth of companies use daily prescription averages only to justify both staffing situations. *(See Table 51 for full details.)*

About 6-in-10 (59 percent) companies use supermarkets as training sites for internship or internship programs and one-fourth (24 percent) of companies report providing scholarship money for pharmacy students. *(See Table 52 for details.)*

Virtually all companies (97 percent) are involved in third party prescription programs. These programs are more often billed at the office level (52 percent) than at the store level (42 percent). Third party participation decisions are usually made at the headquarters level (74 percent). *(See Table 53 for details.)*

TABLE 1

WHETHER SHOPPERS USUALLY PURCHASE PERSONAL CARE PRODUCTS
IN A SUPERMARKET OR A NON-FOOD STORE

	TOTAL FOOD-DRUG COMBINATION <u>SHOPPERS</u>	SHOP STORE WITH NO <u>PHARMACY</u>
BASE: Total in each group	(404)	(208)
	%	%
Supermarket	52	37
<u>Non-food store (net)</u>	<u>44</u>	<u>62</u>
Chain drug store	25	37
Mass merchandiser	13	16
Independent pharmacy	1	2
Discount warehouse	1	2
Department store	*	1
Other type of store	5	3
No answer	-	1
Both supermarket and non-food store equally	1	1
Other type of store	*	-
Unspecified	2	-

*Indicates less than 1%

Q.10a - Some people buy their personal care products, such as skin care, hair care, oral care, sanitary protection, and wound care products, at a supermarket, and some people buy them at a non-food store. Do you buy most of the personal care products for your household at a supermarket or do you buy most at a non-food store?

Q.10c - Is the non-food store where you buy most of your personal care products a... (READ LIST.)

TABLE 2

**WHETHER SHOPPERS USUALLY PURCHASE NONPRESCRIPTION MEDICINES
IN A SUPERMARKET OR A NON-FOOD STORE**

	TOTAL FOOD-DRUG COMBINATION <u>SHOPPERS</u>	SHOP STORE WITH NO <u>PHARMACY</u>
BASE: Total in each group	(404)	(208)
	%	%
Supermarket	56	39
<u>Non-food store (net)</u>	<u>39</u>	<u>57</u>
Chain drug store	23	35
Mass merchandiser	11	15
Independent pharmacy	1	3
Discount warehouse	1	1
Other type of store	3	1
No answer	*	1
Both supermarket and non-food store equally	1	1
Other type of store	*	1
Didn't buy	1	2
Unspecified	3	-

*Indicates less than 1%

Q.11a - How about nonprescription medicines? Do you buy most of the nonprescription medicines for your household at a supermarket or at a non-food store?

Q.11c - Is the non-food store where you buy most of your nonprescription medicines a... (READ LIST.)

TABLE 3

**WHETHER SELECTED PERSONAL CARE/NON-Rx PRODUCTS ARE USUALLY
PURCHASED IN A SUPERMARKET OR IN A NON-FOOD STORE**

	<u>TOTAL FOOD-DRUG COMBINATION SHOPPERS</u>	<u>SHOP STORE WITH NO PHARMACY</u>
BASE: Total in each group	(404)	(208)
	%	%
Hair care products:		
Supermarket	50	35
Non-food store	50	65
Pain reliever products:		
Supermarket	62	42
Non-food store	38	58
Oral care products:		
Supermarket	59	48
Non-food store	41	52
Sanitary protection products:		
Supermarket	59	49
Non-food store	41	51
Cough and cold products:		
Supermarket	58	40
Non-food store	42	60
Skin care products:		
Supermarket	47	34
Non-food store	53	66
Wound care products:		
Supermarket	56	40
Non-food store	44	60

Q.12 - Which of the following products do you usually buy at a supermarket and which do you usually buy at a non-food store? How about... (READ LIST)

TABLE 4

REASONS FOR PURCHASING PERSONAL CARE PRODUCTS AT SUPERMARKETS

	TOTAL FOOD-DRUG COMBINATION <u>SHOPPERS</u>	SHOP STORE WITH NO <u>PHARMACY</u>
BASE:	(404)	(208)
	%	%
<u>Convenience (net)</u>	<u>42</u>	<u>28</u>
<u>One-stop shopping (subnet)</u>	<u>37</u>	<u>24</u>
One-stop shopping/do all shopping at same time/place	25	18
Already at the store/go to the supermarket more than the drugstore	12	7
Saves time	4	2
Close to home/close to work	4	3
<u>Price/sales/coupons (net)</u>	<u>12</u>	<u>10</u>
<u>Price (subnet)</u>	<u>2</u>	<u>2</u>
Less expensive/cheaper/good/better prices	8	7
<u>Coupons (subnet)</u>	<u>4</u>	<u>1</u>
Have double coupons	3	1
<u>Products carried (net)</u>	<u>5</u>	<u>3</u>
Good/better/bigger selection/variety/ well-stocked	4	1

Q.10b - Why do you buy most of your personal care products at (ANSWER FROM Q.10a)?

TABLE 5

REASONS FOR PURCHASING PERSONAL CARE PRODUCTS AT NON-FOOD STORES

	TOTAL FOOD-DRUG COMBINATION <u>SHOPPERS</u>	SHOP STORE WITH NO <u>PHARMACY</u>
BASE:	(404)	(208)
	%	%
<u>Price/sales/coupons (net)</u>	<u>34</u>	<u>49</u>
<u>Price (subnet)</u>	<u>33</u>	<u>48</u>
Less expensive/cheaper/good/better prices	33	48
Have special sales	3	2
<u>Products carried (net)</u>	<u>8</u>	<u>14</u>
Good/better/bigger selection/variety/ well-stocked	7	14
Convenience (net)	3	3

Q.10b - Why do you buy most of your personal care products at (ANSWER FROM Q.10a)?

TABLE 6

REASONS FOR PURCHASING NONPRESCRIPTION MEDICINES AT SUPERMARKETS

	TOTAL FOOD-DRUG COMBINATION SHOPPERS	SHOP STORE WITH NO PHARMACY
BASE:	(404)	(208)
	%	%
<u>Convenience (net)</u>	<u>41</u>	<u>29</u>
<u>One-stop shopping (subnet)</u>	<u>37</u>	<u>26</u>
One-stop shopping/do all shopping at same time/place	23	19
Already at the store/go to the supermarket more than the drugstore	14	8
Saves time	4	1
Close to home/close to work	3	2
<u>Price/sales/coupons (net)</u>	<u>14</u>	<u>10</u>
<u>Price (subnet)</u>	<u>12</u>	<u>3</u>
Less expensive/cheaper/good/better prices	10	7
Coupons (subnet)	3	2
<u>Products Carried (Net)</u>	<u>5</u>	<u>3</u>
Good/better/bigger selection/variety/ well-stocked	4	1

Q.11b - Why do you buy most of your nonprescription medicines at (ANSWER FROM Q.11a)?

TABLE 7

REASONS FOR PURCHASING NONPRESCRIPTION MEDICINES
AT NON-FOOD STORES

	TOTAL FOOD-DRUG COMBINATION <u>SHOPPERS</u>	SHOP STORE WITH NO <u>PHARMACY</u>
BASE:	(404)	(208)
	%	%
<u>Price/sales/coupons (net)</u>	<u>32</u>	<u>44</u>
Less expensive/cheaper/good/better prices	31	43
Coupons (subnet)	1	1
Products carried (Net)	4	11
Convenience (Net)	3	4
Close to home/close to work	2	3

Q.11b - Why do you buy most of your nonprescription medicines at (ANSWER FROM Q.11a)?

TABLE 8

**RATING THE HBC/OTC SECTION OF SUPERMARKET
WHERE MOST FOOD SHOPPING IS DONE COMPARED TO NON-FOOD STORES**

	<u>TOTAL FOOD-DRUG COMBINATION SHOPPERS</u>	<u>SHOP STORE WITH NO PHARMACY</u>
BASE: Total in each group	(404)	(208)
	%	%
Being Convenient to Shop		
Better	56	45
About the same	36	39
Not as good	8	14
Frequently Having Advertised Special Sales		
Better	35	27
About the same	37	29
Not as good	26	38
Having a Wide Variety and Selection of Products and Brands		
Better	34	20
About the same	36	34
Not as good	29	45
Being Well Stocked		
Better	30	22
About the same	45	42
Not as good	24	34
Being Fairly Priced		
Better	27	26
About the same	33	30
Not as good	38	40
Having Someone Available to Answer Questions About Products		
Better	26	11
About the same	41	39
Not as good	31	47
Having a Selection of Products for Infant Care		
Better	15	12
About the same	41	35
Not as good	12	24

TABLE 9

OVERALL RATING OF SUPERMARKET WHERE MOST FOOD SHOPPING IS DONE

	TOTAL FOOD-DRUG COMBINATION <u>SHOPPERS</u>	SHOP STORE WITH NO <u>PHARMACY</u>
BASE: Total in each group	(404)	(208)
	%	%
High rating (8-10)	78	70
10	23	18
9	24	21
8	31	31
Moderate rating (6-7)	17	22
7	11	17
6	6	5
Indifferent rating (5)	4	5
Low rating (0-4)	1	2
4	1	1
3	*	-
2	-	1
1	-	-
0	-	-
No answer	-	1
	100	100
Mean rating	8.3	8.0

*Indicates less than 1%

Q.6c - All things considered, how do you rate (STORE) as a place to shop? Please use a 1-10 scale on which 10 is the highest possible rating and 0 is the lowest possible rating. You can use any number from 10 down to 0. All things considered, what number rating would you give (STORE) as a place to shop?

TABLE 10

**RATING OF SUPERMARKET WHERE MOST FOOD SHOPPING IS DONE
ON SPECIFIC CHARACTERISTICS**

This table shows proportion of consumers who gave
a favorable rating (8,9,10) on each characteristic.

	TOTAL FOOD-DRUG COMBINATION <u>SHOPPERS</u>	SHOP STORE WITH NO <u>PHARMACY</u>
BASE: Total in each group	(404)	(208)
	%	%
Gave an "8-10" rating to...		
Meeting your expectations for cleanliness	83	78
Offering a wide range of services and departments	82	53
Providing good quality service	81	76
Being friendly and personal	80	74
Being progressive and up-to-date	80	65
Offering professional service	76	65
Offering good values	71	76

Q.6d - Still using the same 0 to 10 scale, please rate (STORE) on the following characteristics. How
would you rate store on... (READ LIST STARTING AT RED "X". CONTINUE UNTIL
ALL HAVE BEEN READ.)

TABLE 11

RATING OF STORE WHERE MOST FOOD SHOPPING IS DONE ON
"OFFERING GOOD VALUES"

	TOTAL FOOD-DRUG COMBINATION SHOPPERS	SHOP STORE WITH NO PHARMACY
BASE: Total in each group	(404)	(208)
	%	%
<u>High rating (8-10)</u>	<u>71</u>	<u>76</u>
10	26	29
9	19	21
8	26	26
<u>Moderate rating (6-7)</u>	<u>21</u>	<u>17</u>
7	14	12
6	7	5
<u>Indifferent rating (5)</u>	<u>4</u>	<u>5</u>
<u>Low rating (0-4)</u>	<u>1</u>	<u>2</u>
4	1	1
3	-	1
2	-	-
1	-	-
0	-	-
Don't know/no answer	3	-
	<u>100</u>	<u>100</u>
Mean rating	<u>8.2</u>	<u>8.3</u>

TABLE 12

RATING OF SUPERMARKET WHERE MOST FOOD SHOPPING IS DONE ON
"BEING PROGRESSIVE AND UP-TO-DATE"

	TOTAL FOOD-DRUG COMBINATION <u>SHOPPERS</u>	SHOP STORE WITH NO <u>PHARMACY</u>
BASE: Total in each group	(404)	(208)
	%	%
<u>High rating (8-10)</u>	<u>80</u>	<u>65</u>
10	33	24
9	22	15
8	25	26
<u>Moderate rating (6-7)</u>	<u>13</u>	<u>23</u>
7	10	14
6	3	8
<u>Indifferent rating (5)</u>	<u>3</u>	<u>8</u>
<u>Low rating (0-4)</u>	<u>2</u>	<u>4</u>
4	1	1
3	1	1
2	-	1
1	-	-
0	-	1
Don't know/no answer	<u>2</u>	<u>-</u>
	<u>100</u>	<u>100</u>
Mean rating	<u>8.6</u>	<u>7.8</u>

TABLE 13

RATING OF SUPERMARKET WHERE MOST FOOD SHOPPING IS DONE ON
"OFFERING A WIDE RANGE OF SERVICES AND DEPARTMENTS"

	TOTAL FOOD-DRUG COMBINATION SHOPPERS	SHOP STORE WITH NO PHARMACY
BASE: Total in each group	(404)	(208)
	%	%
<u>High rating (8-10)</u>	<u>82</u>	<u>53</u>
10	38	17
9	21	12
8	23	24
<u>Moderate rating (6-7)</u>	<u>12</u>	<u>25</u>
7	10	16
6	2	8
<u>Indifferent rating (5)</u>	<u>3</u>	<u>11</u>
<u>Low rating (0-4)</u>	<u>1</u>	<u>11</u>
4	1	4
3	-	2
2	-	2
1	-	2
0	-	1
Don't know/no answer	2	=
	<u>100</u>	<u>100</u>
Mean rating	<u>8.7</u>	<u>7.2</u>

TABLE 14

RATING OF SUPERMARKET WHERE MOST FOOD SHOPPING IS DONE ON
"OFFERING PROFESSIONAL SERVICE"

	TOTAL FOOD-DRUG COMBINATION SHOPPERS	SHOP STORE WITH NO PHARMACY
BASE: Total in each group	(404)	(208)
	%	%
<u>High rating (8-10)</u>	<u>76</u>	<u>65</u>
10	30	24
9	18	17
8	28	24
<u>Moderate rating (6-7)</u>	<u>12</u>	<u>19</u>
7	9	11
6	3	8
<u>Indifferent rating (5)</u>	<u>4</u>	<u>7</u>
<u>Low rating (0-4)</u>	<u>3</u>	<u>7</u>
4	2	2
3	1	1
2	-	1
1	-	2
0	-	1
Don't know/no answer	3	-
	<u>100</u>	<u>100</u>
Mean rating	<u>8.3</u>	<u>7.7</u>

TABLE 15

RATING OF SUPERMARKET WHERE MOST FOOD SHOPPING IS DONE ON
"PROVIDING GOOD QUALITY SERVICE"

	TOTAL FOOD-DRUG COMBINATION <u>SHOPPERS</u>	SHOP STORE WITH NO <u>PHARMACY</u>
BASE: Total in each group	(404)	(208)
	%	%
<u>High rating (8-10)</u>	<u>81</u>	<u>76</u>
10	35	27
9	22	22
8	24	27
<u>Moderate rating (6-7)</u>	<u>12</u>	<u>14</u>
7	9	10
6	3	4
<u>Indifferent rating (5)</u>	<u>4</u>	<u>6</u>
<u>Low rating (0-4)</u>	<u>1</u>	<u>4</u>
4	1	1
3	-	1
2	-	-
1	-	1
0	-	1
Don't know/no answer	2	-
	<u>100</u>	<u>100</u>
Mean rating	<u>8.6</u>	<u>8.1</u>

TABLE 16

RATING OF SUPERMARKET WHERE MOST FOOD SHOPPING IS DONE ON
"BEING FRIENDLY AND PERSONAL"

	TOTAL FOOD-DRUG COMBINATION SHOPPERS	SHOP STORE WITH NO PHARMACY
BASE: Total in each group	(404)	(208)
	%	%
<u>High rating (8-10)</u>	<u>80</u>	<u>74</u>
10	36	38
9	22	18
8	22	18
<u>Moderate rating (6-7)</u>	<u>11</u>	<u>15</u>
7	9	13
6	2	2
<u>Indifferent rating (5)</u>	<u>4</u>	<u>6</u>
<u>Low rating (0-4)</u>	<u>3</u>	<u>4</u>
4	1	2
3	1	1
2	-	-
1	1	1
0	-	-
Don't know/no answer	2	1
	<u>100</u>	<u>100</u>
Mean rating	<u>8.6</u>	<u>8.3</u>

TABLE 17

RATING OF SUPERMARKET WHERE MOST FOOD SHOPPING IS DONE ON
"MEETING YOUR EXPECTATIONS FOR CLEANLINESS"

	TOTAL FOOD-DRUG COMBINATION <u>SHOPPERS</u>	SHOP STORE WITH NO <u>PHARMACY</u>
BASE: Total in each group	(404)	(208)
	%	%
<u>High rating (8-10)</u>	<u>83</u>	<u>78</u>
10	38	32
9	24	24
8	21	22
<u>Moderate rating (6-7)</u>	<u>11</u>	<u>14</u>
7	9	9
6	2	5
<u>Indifferent rating (5)</u>	<u>3</u>	<u>4</u>
<u>Low rating (0-4)</u>	<u>1</u>	<u>4</u>
4	1	1
3	-	1
2	-	1
1	-	1
0	-	-
Don't know/no answer	<u>2</u>	<u>-</u>
	<u>100</u>	<u>100</u>
Mean rating	<u>8.7</u>	<u>8.3</u>

TABLE 18

PROPORTION OF PRESCRIPTIONS FILLED AT STORE PHARMACY

	<u>TOTAL FOOD-DRUG COMBINATION SHOPPERS</u>
BASE: Food-drug combination shoppers	(404)
	%
Prescriptions filled in store pharmacy:	
Almost all	21
More than half	10
Less than half	5
Only a small number	15
None	50
Proportion of prescriptions filled in store pharmacy	31

Q. 7a - How much do you use the pharmacy at (STORE) for prescriptions?
 Would you say you have...

TABLE 19A

PRESCRIPTION DRUG DATA

FOOD-DRUG COMBINATION SHOPPERS				
	<u>TOTAL</u>	<u>USE PHARMACY</u>	<u>DO NOT USE PHARMACY</u>	<u>SHOP STORE WITH NO PHARMACY</u>
BASE: total in each group	(404)	(204)	(200)	(208)
	%	%	%	%
Average number of prescriptions filled per year (median)	12	13	9	10
Have had prescriptions delivered to home in past year	8	9	8	13
Have had maintenance prescriptions filled in past year	55	57	54	50
Have insurance plan that requires Rx's to be purchased at certain stores	24	20	27	28

Q. 16a - First, about how many prescriptions do you have filled per year?

Q. 16b - Have you had any prescriptions delivered to your home in the past year?

Q. 16d - Do you have any prescriptions that you refill on an ongoing basis to treat a longterm problem or need, or do you just get prescriptions when you need them to treat a passing problem?

Q. 17a - Do you have an insurance plan that covers prescriptions and requires you to get your prescriptions at a certain store or stores?

TABLE 19B

DEMOGRAPHIC CHARACTERISTICS OF SUPERMARKET PHARMACY USERS
VS. NON-USERS

FOOD-DRUG COMBINATION SHOPPERS

	<u>TOTAL</u>	<u>USE PHARMACY</u>	<u>DO NOT USE PHARMACY</u>
BASE: total in each group	(404)	(204)	(200)
	%	%	%
<u>Median age</u>	<u>44</u>	<u>42</u>	<u>44</u>
<u>Sex</u>			
Male	18	16	21
Female	82	84	79
<u>Education</u>			
Attended at least some college	57	59	55
<u>Marital status</u>			
Married	64	69	59
<u>Employment status</u>			
Employed	55	58	51
Full-time	47	48	46
<u>Number of people in household</u>			
Mean number of people in household	2.8	3.0	2.5
Mean number under 18 years	.7	1.0	.5
<u>Median annual family income</u>			
	\$41,800	\$44,400	\$37,700

TABLE 20

**OPINION ON WHETHER THE FOOD-DRUG COMBINATION PHARMACY
MAKES THE STORE A BETTER PLACE TO SHOP**

	FOOD-DRUG COMBINATION SHOPPERS		
	<u>TOTAL</u>	<u>USE PHARMACY</u>	<u>DO NOT USE PHARMACY</u>
BASE: Total in each group	(404) %	(204) %	(200) %
Pharmacy in store makes store...			
A much better place to shop	26	46	5
A slightly better place to shop	13	18	8
Makes no difference	61	36	88
No answer	<u>*</u> 100	<u>±</u> 100	<u>1</u> 100

*Indicates less than 1%

Q. 6e - You mentioned that the (STORE) has a pharmacy. As far as you are concerned, does the presence of a pharmacy in (STORE) make (STORE) a much better place to shop, a slightly better place to shop, or doesn't it make any difference to you?

TABLE 21

**COMPARISON OF FOOD-DRUG COMBINATION PHARMACY
WITH OTHER PHARMACIES WHERE PRESCRIPTIONS HAVE BEEN BOUGHT**

	FOOD-DRUG COMBINATION SHOPPER		
	<u>TOTAL</u>	<u>USE PHARMACY</u>	<u>DO NOT USE PHARMACY</u>
BASE: Food-drug combination shoppers	(404)	(204)	(200)
	%	%	%
Store pharmacy is...			
Much better	9	17	2
A little better	8	12	3
About the same	47	54	39
Not quite as good	11	6	17
Not nearly as good	7	4	9
No opinion	17	6	28
No answer	<u>1</u>	<u>1</u>	<u>2</u>
	100	100	100

Q. 7c - For my next few questions I'd like you to compare the pharmacy at (STORE) with the other pharmacy where you have bought prescriptions, (NAME IN Q. 7b). Overall, would you say the pharmacy at (STORE) is...

TABLE 22

**ADVANTAGES OF FOOD-DRUG COMBINATION PHARMACY AS COMPARED TO
OTHER PHARMACIES WHERE PRESCRIPTIONS HAVE BEEN BOUGHT**

	FOOD-DRUG COMBINATION SHOPPER	
	<u>USE PHARMACY</u>	<u>DO NOT USE PHARMACY</u>
BASE: Food-drug combination shoppers	(204)	(200)
	%	%
<u>Convenience (net)</u>	<u>73</u>	<u>43</u>
<u>One-stop (subnet)</u>	<u>51</u>	<u>34</u>
Get a prescription filled while shopping	39	18
One-stop shopping/do all shopping at same time/place	19	19
<u>Convenient location (subnet)</u>	<u>22</u>	<u>6</u>
Closer to home/work	19	5
More convenient location/easier to get to	4	2
<u>Time factor (subnet)</u>	<u>15</u>	<u>5</u>
Quicker/saves time	8	3
Fill prescriptions faster	3	2
Ready when finished shopping	4	-
Miscellaneous convenience comments	2	2
Less expensive/cheaper/better/good prices	18	3
<u>Staff (net)</u>	<u>9</u>	<u>3</u>
Friendly staff	3	2
Staff is helpful	3	1
Staff is willing/more willing to answer questions	1	1
Knowledgeable staff	1	-
Miscellaneous staff comments	3	-

TABLE 22 (Continued)

ADVANTAGES OF FOOD-DRUG COMBINATION PHARMACY AS COMPARED TO OTHER PHARMACIES WHERE PRESCRIPTIONS HAVE BEEN BOUGHT (CONTINUED)

	FOOD-DRUG COMBINATION SHOPPER	
	USE PHARMACY	DO NOT USE PHARMACY
BASE: Food-drug combination shoppers	(204)	(200)
	%	%
Open more hours/better hours/open later/ open 24 hours	6	2
Personal information is on the computer/on their records	3	1
Take third party insurance/plan	1	1
Miscellaneous comments	5	5
None/nothing/no advantages/don't know	13	48

Q.7d - What are the advantages, if any, of the pharmacy at (STORE) compared to the pharmacy where you usually buy prescriptions?

Q.7e - What other advantages do you think the (STORE) pharmacy has?

TABLE 23

DISADVANTAGES OF FOOD-DRUG COMBINATION PHARMACY AS COMPARED TO
OTHER PHARMACIES WHERE PRESCRIPTIONS HAVE BEEN BOUGHT

	FOOD-DRUG COMBINATION SHOPPER	
	USE PHARMACY	DO NOT USE PHARMACY
BASE: Food-drug combination shoppers	(204)	(200)
	%	%
<u>Pricing (net)</u>	<u>18</u>	<u>24</u>
More expensive/higher prices/cheaper at the drugstore	17	22
<u>Not convenient (net)</u>	<u>16</u>	<u>12</u>
Further from home/work	5	8
<u>Time factor (subnet)</u>	<u>2</u>	<u>2</u>
Takes too long to get a prescription	5	1
Too crowded/long lines	3	1
Wait is too long	3	1
Don't deliver	3	1
Miscellaneous	1	2
<u>Staff (net)</u>	<u>6</u>	<u>7</u>
<u>Not personalized/friendly (subnet)</u>	<u>5</u>	<u>6</u>
Not personalized service	4	5
Not friendly/as friendly/pharmacist		
Unpleasant	2	1
<u>Selection of products (net)</u>	<u>5</u>	<u>5</u>
Don't have a wide selection/complete line of products	4	5

TABLE 23 (Continued)

**DISADVANTAGES OF FOOD-DRUG COMBINATION PHARMACY AS COMPARED TO
OTHER PHARMACIES WHERE PRESCRIPTIONS HAVE BEEN BOUGHT (CONTINUED)**

	FOOD-DRUG COMBINATION SHOPPER	
	<u>USE PHARMACY</u>	<u>DO NOT USE PHARMACY</u>
BASE: Food-drug combination shoppers	(204)	(200)
	%	%
<u>No HMO/third party plan (net)</u>	<u>2</u>	<u>4</u>
Not on prescription plan/program	1	4
Not open for as long/not open 24 hours	3	2
Small pharmacy	-	3
Not familiar with pharmacy/pharmacist	-	2
Miscellaneous comments	1	2
None/nothing/no disadvantages/don't know	58	46

Q.7f - What are the disadvantages, if any, of the (STORE) pharmacy compared to the pharmacy where you usually buy prescriptions?

Q.7g - What other disadvantages do you think the (STORE) pharmacy has?

TABLE 24

**RATINGS OF FOOD-DRUG COMBINATION PHARMACY COMPARED TO
OTHER PHARMACIES WHERE PRESCRIPTIONS HAVE BEEN BOUGHT
ON SPECIFIC ATTRIBUTES**

	<u>USE PHARMACY</u>	<u>DO NOT USE PHARMACY</u>
BASE: Food-drug combination shoppers	(204)	(200)
	%	%
Being conveniently located to you		
Better	57	32
About the same	25	38
Not as good	17	26
Being well stocked		
Better	23	9
About the same	59	48
Not as good	13	23
Being fairly priced		
Better	37	11
About the same	34	27
Not as good	24	39
Filling prescriptions in the time promised		
Better	33	3
About the same	54	43
Not as good	8	12
Having friendly helpful pharmacists		
Better	36	8
About the same	50	48
Not as good	12	14
Being open during the hours when you may need it		
Better	42	30
About the same	44	36
Not as good	11	14
Having a good reputation		
Better	23	8
About the same	68	54
Not as good	6	17

TABLE 24 (Continued)

**RATINGS OF FOOD-DRUG COMBINATION PHARMACIES COMPARED TO
OTHER PHARMACIES WHERE PRESCRIPTIONS HAVE BEEN BOUGHT
ON SPECIFIC ATTRIBUTES (CONTINUED)**

	<u>USE PHARMACY</u>	<u>DO NOT USE PHARMACY</u>
BASE: Food-drug combination shoppers	(204)	(200)
	%	%
Having an adequate pharmacy staff		
Better	27	6
About the same	57	46
Not as good	12	16
Having a pharmacist who is willing and available to answer questions about nonprescription products		
Better	30	8
About the same	52	44
Not as good	11	16
Meeting your expectations for cleanliness		
Better	24	8
About the same	71	73
Not as good	4	5
Filling prescriptions in an acceptable length of time		
Better	32	7
About the same	55	44
Not as good	10	10
Being able to have a personal relationship with the pharmacist		
Better	28	8
About the same	49	33
Not as good	16	23

TABLE 25

OPINION ON WHETHER HAVING A PHARMACY IN THEIR
SUPERMARKET WOULD MAKE IT A BETTER PLACE TO SHOP

	SHOP STORE WITH NO <u>PHARMACY</u>
	(208)
	%
<u>A pharmacy would make</u> <u>the food store:</u>	
A much better place to shop	9
A slightly better place to shop	10
Makes no difference	<u>81</u>
	100

TABLE 26A

**INTEREST IN USING PHARMACY IF ADDED
TO SUPERMARKET WHERE MOST FOOD SHOPPING IS DONE**

	<u>SHOP STORE WITH NO PHARMACY</u>
BASE: Those who shop at a store without a pharmacy	(208)
	%
Very interested	15
Somewhat interested	20
Not very interested	16
Not at all interested	49

Q. 7a - Suppose that (STORE) added a pharmacy, how interested would you be in using the pharmacy at (STORE) to have prescriptions filled? Would you say you would be...

TABLE 26B

COMMENTS REGARDING THE IDEA OF HAVING A
PHARMACY IN A SUPERMARKET

(Key Mentions)

SHOP STORE WITH NO PHARMACY

BASE: Those who shop at a (208)
store without a pharmacy %

Favorable comments

It would be convenient	28
You can have prescriptions filled while shopping	24
The prices would probably be lower	5
It would be close to home/work	5

Unfavorable comments

It wouldn't be convenient	16
The prices would probably be higher	14
They probably would not accept HMO third party plans	13

TABLE 27

**RATING OF THE IDEA OF A SUPERMARKET PHARMACY (IF ADDED)
COMPARED TO PHARMACY USUALLY USED ON SPECIFIC ATTRIBUTES**

	<u>TOTAL</u> (208)
BASE: Those who shop at a store without a pharmacy	%
Being conveniently located for you	
Better	40
About the same	36
Not as good	23
Being fairly priced	
Better	25
About the same	35
Not as good	28
Being open during the hours when you may need it	
Better	38
About the same	41
Not as good	12
Having a good reputation	
Better	18
About the same	56
Not as good	19
Having a pharmacist who is willing and available to answer questions about nonprescription products	
Better	15
About the same	50
Not as good	25
Meeting your expectations for cleanliness	
Better	15
About the same	67
Not as good	14
Being a good source for emergency prescription needs	
Better	28
About the same	56
Not as good	23
Being able to have a personal relationship with the pharmacist	
Better	16
About the same	48
Not as good	25

TABLE 28

LOCATION OF PHARMACY IN STORE

FOOD-DRUG COMBINATION SHOPPER

	<u>TOTAL</u>	<u>USE PHARMACY</u>	<u>DO NOT USE PHARMACY</u>
BASE: Food-drug combination shoppers	(404)	(204)	(200)
	%	%	%
Pharmacy is...			
In the front of the store	64	59	69
In the back of the store	29	35	23
In the side of the store	2	2	3
In the middle of the store	4	3	4
No answer	1	1	1
	100	100	100

Q.14a - Please think about where the pharmacy is located in the store. Is the pharmacy located close to the front of the store, or is it in the back of the store?

Q.14b - Do you think that where the pharmacy is located in the store is... (READ LIST)

TABLE 29

RATING OF LOCATION OF PHARMACY IN STORE
IN TERMS OF CONVENIENCE

	TOTAL HAVE PHARMACY IN:	
	<u>FRONT</u>	<u>BACK</u>
BASE: Food-drug combination shoppers	(259)	(119)
	%	%
Location is...		
Very convenient	69	34
Somewhat convenient	27	50
Not very convenient	1	8
Not at all convenient	-	3
Doesn't matter	*	3
Unspecified	<u>3</u> 100	<u>2</u> 100

*Indicates less than 1 percent

Q.14a - Please think about where the pharmacy is located in the store. Is the pharmacy located close to the front of the store, or is it in the back of the store?

Q.14b - Do you think that where the pharmacy is located in the store is... (READ LIST)

TABLE 30

**TYPES OF PRODUCTS LOCATED NEXT TO THE PHARMACY
WHERE MOST SHOPPING IS DONE**

	<u>TOTAL</u>
BASE: Food-drug combination shoppers	(404)
	%
Nonprescription medicines	91
Personal care products	82
Greeting cards	41
Any food products	35
Video rental section	34

Q.14c - What type of products are located next to the pharmacy? How about...

TABLE 31

**WHETHER CERTAIN PRODUCTS SHOULD BE
LOCATED NEXT TO PHARMACY OR NOT**

	<u>TOTAL</u>
BASE: Food-drug combination shoppers	(404)
	%
Nonprescription medicine	85
Personal care products	80
Greeting cards	39
Video rental section	23
Any food product	11

Q.14d - I'd like your opinion of whether or not each of the types of products we just talked about should be located next to the pharmacy, whether or not they are already located there.

TABLE 32

**WHETHER STORE WHERE MOST FOOD SHOPPING IS DONE
HAS BLOOD PRESSURE MACHINES FOR SHOPPERS**

FOOD-DRUG COMBINATION SHOPPERS

	<u>TOTAL</u>	<u>USE PHARMACY</u>	<u>DO NOT USE PHARMACY</u>	<u>SHOP STORE WITH NO PHARMACY</u>
BASE: Total in each group	(404)	(204)	(200)	(208)
	%	%	%	%
Have machines to test blood pressure or pulse rate	48	59	36	8
Does not have machines to test blood pressure or pulse rates	<u>52</u> 100	<u>41</u> 100	<u>64</u> 100	<u>92</u> 100

Q. 15a -Does (STORE) have any machines available to test shoppers' blood pressure or pulse rate?

TABLE 33

RATING OF THE IDEA OF HAVING BLOOD
PRESSURE MACHINES FOR SHOPPERS

	FOOD-DRUG COMBINATION SHOPPERS			
	<u>TOTAL</u>	<u>USE PHARMACY</u>	<u>DO NOT USE PHARMACY</u>	<u>SHOP STORE WITH NO PHARMACY</u>
BASE: Total in each group	(404)	(204)	(200)	(208)
	%	%	%	%
Excellent	20	24	16	15
Very good	15	14	17	10
Good	43	44	42	42
Fair	6	4	8	11
Poor	13	12	14	21
No answer	<u>3</u>	<u>2</u>	<u>3</u>	<u>1</u>
	100	100	100	100

Q.15b - How do you rate the idea of having these kinds of machines available at (STORE)? Would you say the idea is... (READ LIST)

TABLE 34

WHETHER STORE WHERE MOST FOOD SHOPPING IS DONE
SPONSORS HEALTH SCREENING EVENTS

	FOOD-DRUG COMBINATION SHOPPERS			
	<u>TOTAL</u>	<u>USE PHARMACY</u>	<u>DO NOT USE PHARMACY</u>	<u>SHOP STORE WITH NO PHARMACY</u>
BASE: Total in each group	(404)	(204)	(200)	(208)
	%	%	%	%
Store sponsors health screening rates	22	24	21	13
Store does not sponsor health screening rates	75	75	75	87
No answer	<u>3</u> 100	<u>1</u> 100	<u>4</u> 100	<u>*</u> 100

Q. 15c - Does (STORE) ever sponsor health screening events where they bring in professionals and machines for a few days to test such things as cholesterol, blood sugar level, etc.?

TABLE 35

**RATING OF THE IDEA OF HAVING HEALTH SCREENING EVENTS
AT THE STORE WHERE MOST FOOD SHOPPING IS DONE**

	FOOD-DRUG COMBINATION SHOPPERS			
	<u>TOTAL</u>	<u>USE PHARMACY</u>	<u>DO NOT USE PHARMACY</u>	<u>SHOP STORE WITH NO PHARMACY</u>
BASE: Total in each group	(404)	(204)	(200)	(208)
	%	%	%	%
Excellent	22	24	20	16
Very good	17	18	15	14
Good	42	43	42	45
Fair	6	5	8	11
Poor	9	7	11	13
No answer	<u>4</u> 100	<u>3</u> 100	<u>4</u> 100	<u>1</u> 100

Q. 15d - How do you rate the idea of (STORE) sponsoring these types of health screening events?

TABLE 36

NUMBER OF STORES SHOPPED FOR MAJOR FOOD SHOPPING

	TOTAL FOOD-DRUG COMBINATION <u>SHOPPERS</u>	SHOP STORE WITH NO <u>PHARMACY</u>
BASE: Total in each group	(404)	(208)
	%	%
One	35	37
Two	40	41
Three	19	17
Four	5	5
Five or more	<u>1</u>	<u>2</u>
	100	100

Q.6b - In total, how many different food stores do you currently shop for your major food shopping?

TABLE 37

PERCENTAGE OF FOOD SHOPPING DONE AT STORE
WHERE MOST SHOPPING IS DONE

	TOTAL FOOD-DRUG COMBINATION SHOPPERS	SHOP STORE WITH NO PHARMACY
BASE: Total in each group	(404)	(208)
	%	%
100%	35	37
90%	19	17
80%	17	12
70%	12	15
60%	7	9
50%	9	7
40%	1	1
30%	*	1
20%	*	-
10%	*	1
	100	100
Average (mean)	82.8	82.4

*Indicates less than 1%

Q.6a - Thinking of your major food shopping, of every 10 times you food shop, about how many times do you shop at (STORE)?

TABLE 38

NUMBER OF MILES FROM HOME TO STORE
WHERE MOST FOOD SHOPPING IS DONE

	TOTAL FOOD-DRUG COMBINATION <u>SHOPPERS</u>	SHOP STORE WITH NO <u>PHARMACY</u>
BASE: Total in each group	(404)	(208)
	%	%
Less than one mile	18	29
1 mile	25	21
2 miles	23	18
3 miles	16	12
4 miles	7	4
5 miles	4	4
6 or more miles	3	7
No answer	<u>4</u> 100	<u>5</u> 100
Mean number of miles	2.1	2.4

Q.18 - About how many miles is (STORE) from your home?

TABLE 39

**PROPORTION OF FRESH PRODUCE PURCHASED
AT STORE WHERE MOST SHOPPING IS DONE**

	TOTAL FOOD-DRUG COMBINATION <u>SHOPPERS</u>	SHOP STORE WITH NO <u>PHARMACY</u>
BASE: Total in each group	(404)	(208)
	%	%
Almost all	47	46
Over half	26	27
About half	17	15
Less than half	7	7
None	2	5
Unspecified	1	-
Average of all "fresh produce" shopping done in main store	76	76

-
- Q.9a - Now I would like you to tell me how much you use (STORE) for certain other products. As I read each type of product please tell me whether or not you ever buy that kind of product at (STORE). How about... (READ LIST.)
- Q.9b - As I read each type of item that you purchase at (STORE), please tell me how much you use (STORE) for that product.

TABLE 40

**PROPORTION OF FRESH MEATS PURCHASED
AT STORE WHERE MOST SHOPPING IS DONE**

	TOTAL FOOD-DRUG COMBINATION <u>SHOPPERS</u>	SHOP STORE WITH NO <u>PHARMACY</u>
BASE: Total in each group	(404)	(208)
	%	%
Almost all	43	41
Over half	21	27
About half	17	13
Less than half	10	4
None	8	15
Unspecified	1	-
Average of all "fresh meat" shopping done in main store	70	69

Q.9a - Now I would like you to tell me how much you use (STORE) for certain other products. As I read each type of product please tell me whether or not you ever buy that kind of product at (STORE). How about... (READ LIST.)

Q.9b - As I read each type of item that you purchase at (STORE), please tell me how much you use (STORE) for that product.

TABLE 41

PROPORTION OF FROZEN FOODS PURCHASED
AT STORE WHERE MOST SHOPPING IS DONE

	TOTAL FOOD-DRUG COMBINATION <u>SHOPPERS</u>	SHOP STORE WITH NO <u>PHARMACY</u>
BASE: Total in each group	(404)	(208)
	%	%
Almost all	52	55
Over half	24	22
About half	14	12
Less than half	5	4
None	4	7
Unspecified	1	-
Average of all "frozen foods" shopping done in main store	78	79

Q.9a - Now I would like you to tell me how much you use (STORE) for certain other products. As I read each type of product, please tell me whether or not you ever buy that kind of product at (STORE). How about... (READ LIST.)

Q.9b - As I read each type of item that you purchase at (STORE), please tell me how much you use (STORE) for that product.

TABLE 42

PROPORTION OF DAIRY PRODUCTS PURCHASED
AT STORE WHERE MOST SHOPPING IS DONE

	TOTAL FOOD-DRUG COMBINATION <u>SHOPPERS</u>	SHOP STORE WITH NO <u>PHARMACY</u>
BASE: Total in each group	(404)	(208)
	%	%
Almost all	52	60
Over half	28	21
About half	13	10
Less than half	4	4
None	2	5
Unspecified	1	-
Average of all "dairy products" shopping done in main store	80	82

-
- Q.9a - Now I would like you to tell me how much you use (STORE) for certain other products. As I read each type of product, please tell me whether or not you ever buy that kind of product at (STORE). How about... (READ LIST.)
- Q.9b - As I read each type of item that you purchase at (STORE), please tell me how much you use (STORE) for that product.

TABLE 43

PROPORTION OF PAPER GOODS PURCHASED
AT STORE WHERE MOST SHOPPING IS DONE

	TOTAL FOOD-DRUG COMBINATION SHOPPERS	SHOP STORE WITH NO PHARMACY
BASE: Total in each group	(404)	(208)
	%	%
Almost all	44	44
Over half	21	24
About half	17	14
Less than half	9	9
None	8	8
Unspecified	1	1
Average of all "paper goods" shopping done in main store	71	71

Q.9a - Now I would like you to tell me how much you use (STORE) for certain other products. As I read each type of product, please tell me whether or not you ever buy that kind of product at (STORE). How about... (READ LIST.)

Q.9b - As I read each type of item that you purchase at (STORE), please tell me how much you use (STORE) for that product.

TABLE 44

SHOPPER CHARACTERISTICS

	TOTAL FOOD-DRUG COMBINATION SHOPPERS	SHOP STORE WITH NO PHARMACY
BASE: Total in each group	(404)	(208)
	%	%
<u>Sex of respondent</u>		
Male	18	16
Female	<u>82</u>	<u>84</u>
	100	100
<u>Age of respondent</u>		
Under 30	13	14
30-39	24	25
40-49	22	19
50-59	13	10
60 and older	23	28
Refused	5	4
Median age	44	42
<u>Education of respondent</u>		
High school or less	42	43
Some college	22	26
College graduate/beyond	35	30
Refused	<u>1</u>	<u>1</u>
	100	100
<u>Marital status</u>		
Married	64	61
Not married	35	38
Refused	<u>1</u>	<u>1</u>
	100	100

TABLE 44 (Continued)

SHOPPER CHARACTERISTICS (CONTINUED)

	TOTAL FOOD-DRUG COMBINATION <u>SHOPPERS</u>	SHOP STORE WITH NO <u>PHARMACY</u>
BASE: Total in each group	(404)	(208)
	%	%
<u>Employment status</u>		
Employed	55	57
Full-time	47	43
Part-time	8	14
Not employed	45	43
Refused	*	*
<u>Number Of People In Household</u>		
One	20	24
Two	31	28
Three or four	36	37
Five or more	12	11
Refused	1	-
Mean	2.8	2.8
<u>Number Of People In Household Under Age 18</u>		
None	62	62
One or two	29	30
Three or more	8	8
No answer	1	-
Mean	.7	.8
<u>Annual Family Income</u>		
Under \$30,000	22	27
\$30,000 - \$49,999	28	29
\$50,000 or more	28	25
Refused	22	19
Median	\$41,818	\$38,087

*Indicates less than 1%

TABLE 45

**FACTORS THAT ARE EXTREMELY IMPORTANT IN
ATTRACTING AND RETAINING CUSTOMERS**

	<u>PHARMACY DIRECTORS</u>
BASE	(65)
	%
Service	71
Convenience	65
Customers feeling they have a personal relationship with the pharmacist	63
Professional image	51
Hours of operation	21
Price	21
Full-line HBC offerings	21

Q. 4: Please rate the following as to their importance of attracting and retaining pharmacy customers.

TABLE 46

**FACTORS THAT ARE EXTREMELY IMPORTANT IN
BUILDING AND MAINTAINING A LOYAL CUSTOMER BASE**

PHARMACY DIRECTORS

BASE	(65) %
Pharmacists accessible to customers for questions/ consultations	80
Having patient medication record systems	77
Pharmacist has enough time to interact/form relationships with customers	55
Having "pharmacy" prominent on outside sign	55
Having over-the-counter products adjacent to the prescription area	46
Advertising specific to the pharmacy	40
Location of the pharmacy within the store	35
The word "pharmacy" in the store name	31
Having additional health-related services to build customer loyalty to the pharmacy (e.g., blood pressure units, cholesterol testing, eye tests, etc.)	23
Having customer waiting area	18
Having private label OTC and personal care products	15
Having special promotions to customers using long- term medications	11
Having pharmacy out-reach programs	9
Having area for patient consultations in the pharmacy	6
Having a home delivery service	5
Having an emergency prescription service	3

Q. 1a: Please rate the following factors as to their level of importance in building and maintaining a loyal customer base. For most factors that are not currently part of your operation, please rate their potential importance.

TABLE 47

PHARMACIST/PATIENT INTERACTION

	PHARMACY DIRECTORS
BASE	(65)
	%
<u>Time To consult with patients:</u>	
Believe pharmacists have enough time to consult with patients	69
No, they do not have enough time to consult with patients	31
<u>Presence of separate consulting areas:</u>	
Yes, pharmacies have separate consulting rooms/areas	23
Customer reaction to rooms is positive	12
No, they do not have separate consulting rooms/areas	77

Q. 6: Do you feel your pharmacists have enough time to consult with their patients?

Q. 7: Do any of your pharmacies have separate consulting rooms or areas?

Q. 8: If "yes," have you found customer/patient reaction to these consulting rooms/areas to be generally positive?

TABLE 48

FACTORS THAT ARE EXTREMELY EFFECTIVE
IN PROMOTING PHARMACIES

	PHARMACY DIRECTORS
BASE	(65)
	%
Good prices on maintenance medications	45
Diabetic programs	15
Senior citizens programs	14
In-store promotions	12
Pharmacist "personality" ad or "image" ads	12
Coupons for pharmacy products	12
New baby/first-time parent programs	8
Service ads	6
Pharmacy price and items in ads	6

Q. 3: Please rate the following as to their effectiveness in promoting pharmacies. For those items that are not currently part of your operation, please rate their potential effectiveness.

TABLE 49

FACTORS THAT ARE EXTREMELY IMPORTANT FOR
SUCCESSFUL PHARMACY OPERATIONS

	<u>PHARMACY DIRECTORS</u>
BASE	(65)
	%
Top management commitment to pharmacy	85
Effective retention of pharmacy professionals	66
Effective recruitment of pharmacy professionals	63
Middle-management commitment to pharmacy	63
Store-level management commitment to pharmacy	57
Top management belief that the pharmacist has store-wide impact beyond profit and loss	57

Q 5a: Please think for a moment about the internal factors that affect your pharmacy operations. Please rate the following as to their importance for successful pharmacy operations.

TABLE 50

SUMMARY OF AREAS WHERE PHARMACY IS EXTREMELY IMPORTANT
TO TOTAL STORE OPERATION

	PHARMACY <u>DIRECTORS</u>
BASE	(65)
	%
Increasing HBA sales in correlation with prescription sales	52
Increasing customer perception that the store provides good service	51
Retaining existing customers/customer loyalty	38
Maintaining the overall image of the store	38
Drawing new customers to the store	18

Q. 2: Please rate how important the pharmacy is in each of the following areas/aspects of the total store operation.

TABLE 51

PHARMACY PERSONNEL ISSUES

	PHARMACY DIRECTORS
BASE	(65)
	%
WHO SUPERVISES CLERKS AT STORE LEVEL	
Pharmacy manager only	65
Pharmacy manager and store manager	23
Store manager only	8
Other	3
No answer	2
WHETHER COMPANY EMPLOYS PHARMACY SUPPORT PERSONNEL	
Yes	91
No	8
No answer	1
CRITERIA USED TO JUSTIFY STAFFING LEVELS/ LABOR COSTS	
- Daily prescriptions average and pharmacy dollar sales	73
Daily prescriptions average only	22
Pharmacy dollar sales only	2
Other	10
CRITERIA USED TO JUSTIFY ADDING ADDITIONAL PHARMACISTS	
Daily prescriptions average and pharmacy dollar sales	65
- Daily prescriptions average only	26
Pharmacy dollar sales only	3
Other	9

-
- Q. 12: At the store level, who supervises pharmacy clerks, i.e., does performance reviews, administers discipline, etc.?
- Q. 13: Does your company employ pharmacy support personnel (technicians)?
- Q. 14: If "yes," what criteria are used to justify their staffing levels/justify labor costs, etc.?
- Q. 15: What criteria are used to justify adding additional pharmacists?

TABLE 52

RECRUITING PHARMACISTS FOR SUPERMARKETS

		PHARMACY DIRECTORS
BASE		(65)
		%
WHETHER COMPANY IS USING ANY STORES AS TRAINING SITES FOR INTERNSHIP/EXTERNSHIP PROGRAMS		
Yes		59
No		40
No answer		1
WHETHER COMPANY IS PROVIDING SCHOLARSHIP MONIES FOR PHARMACY STUDENTS		
Yes		24
No		71
No answer		5

Q. 16: Is your company actually involved in any of the following?

TABLE 53

THIRD-PARTY PROGRAMS

	PHARMACY DIRECTORS
BASE	(65)
	%
Company is involved in third-party prescription drug programs	97
Billing is handled at	
Office level	52
Store level	42
Outside service	2
No answer	1
Third-party participation decision is made at	
Headquarters-level pharmacy department	74
Store-level pharmacy department	17
Other	5
No answer	1
Company is not involved in third-party programs	-
No answer	3

Q. 18: Is your company involved in any third-party drug programs?

Q. 19: If yes, is the third-party billing handled at...?

Q. 20: At what level in the organization is the decision made to participate in third-party prescription drug programs?

METHODOLOGY

The research was conducted in three phases.

Phase I

Before quantitative research was undertaken, focus group sessions were conducted. This research was conducted among primary food shoppers who make pharmacy purchases and have filled two or more prescriptions in the past year.

Phase II

Quantitative consumer research was conducted via telephone. Prior to starting the study, a test was conducted in four cities to determine the incidence of food-drug combination shoppers in areas where food-drug combination stores are present, and further, to determine what percent of food-drug combination shoppers use the pharmacy.

For the main consumer study telephone numbers were generated using directories from 11 specific market areas. Initially, four telephone exchanges were chosen per area, each with at least one food-drug combination store in that exchange. Telephone directories were then scanned for these target exchanges. When an applicable phone number was found, the final digit was changed by one in order to include unlisted phone numbers. In areas that proved unproductive in terms of finding food-drug combination shoppers, additional exchanges were added.

Phase III

The research with pharmacy directors was conducted via a self-administered questionnaire mailed to the respondents.

SAMPLE A total of 612 interviews were conducted with consumers who indicated that they were responsible for most of their household's food shopping as well as for purchasing prescriptions. Five hundred and five (505) interviews were conducted with females (83 percent) and 107 with males (17 percent).

Based on information about the supermarket where the consumer does most of his/her food shopping, respondents were distributed into the following three cells:

- 204 Supermarket has a pharmacy -- respondent shops at the pharmacy
- 200 Supermarket has a pharmacy -- respondent does not shop at the pharmacy
- 208 Supermarket does not have a pharmacy
- 612 Total

Questionnaires were mailed to 165 supermarket pharmacy directors; 65 responded to the survey.

MARKET AREAS

The consumer research was conducted in New York City, Rochester, Philadelphia, Atlanta, Houston, Orlando, St. Louis, Chicago, Seattle, San Francisco, and Los Angeles. (Focus groups were conducted in New York Metro area, Chicago and San Francisco.)

TIMING

Focus Groups: Fall 1990

Quantitative Consumer Interviewing: March 1-10, 1991
Mailing of Questionnaire To Pharmacists: March 1991

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